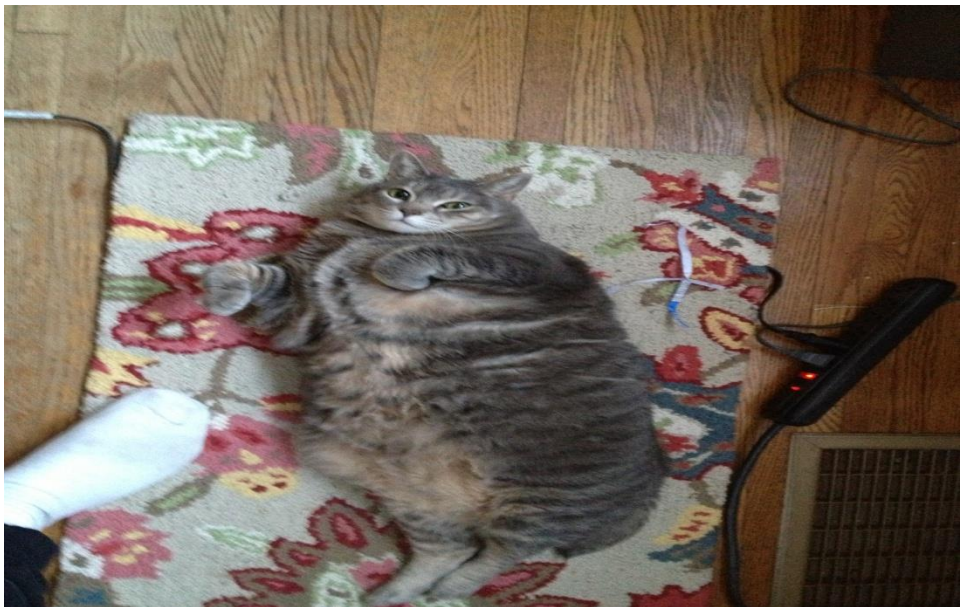
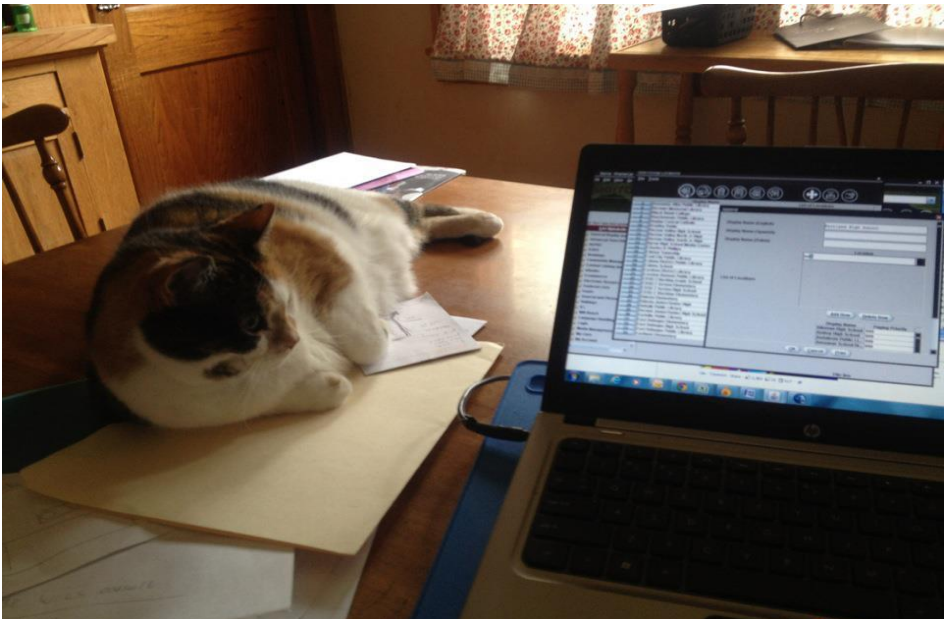


# DECISION CENTER

Mike McClellan Senior Library Training Consultant -  
Innovative

# Who is this guy?

- 10+ years with Innovative
- Based in Minneapolis MN
- Head of Circulation at MPLS Public Library
- Several Marmot Projects



# Agenda

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- Specific Questions
- Highlight various reports of interest to Directors
- Future of Decision Center

# What is Decision Center?

- **What is happening at my library? What do I do about what is happening?**
- **Supports data-driven collection management**
  - ▣ **Supply and demand-based analysis**
  - ▣ **Optimize collection budget allocations**
  - ▣ **Make collection management workflows more efficient**
- ***Note at no point does it mention Circulation Statistics hence...***

# Why?

- “Why did someone from Innovative say not to use this for circulation statistics?”
  - ▣ Especially since there are quite a few circulation statistical reports.
  
  - ▣ Should we be using Web Management Reports or Circulation Activity Reports instead?
    - WMR <http://sierra.marmot.org/manage>
      - Will more than likely require Java exceptions be added
    - CAR <http://sierra.marmot.org/iii/webbrpt>
    - Sierra Staff Client – Top Left toolbar | Reports

# Margin of Error

- “Decision Center's focus is high-level statistical trends; numerical differences of  $<1\%$  between Decision Center reports and Web Management Reports are not statistically significant.”
  - ▣ *Except when they are statistically significant for example reciprocal lending costs.*
  - ▣ *Or you are a branch manager trying to beat a colleague.*

# Data Drift

- Decision Center and Web Management Reports use different metrics for evaluating some data. Some of the differences include:
  - ▣ Web Management Reports transaction counts by codes are static counts that reflect the codes in place at the time of the transaction.
  - ▣ For circulation reporting in Decision Center, item code data also reflects the values stored at the time of the transaction.
  - ▣ In many other reports, Decision Center displays the codes currently present in patron and item records.
  - ▣ For this reason, past transaction activity for records could show a different count for a given code when viewing the same report in Web Management Reports versus Decision Center. *Because it shows what the codes are now as opposed to what they were.*

# Drifting Example

- A patron with a juvenile patron type checks out 10 items in March at Main. The March report would include these 10 in a juvenile patron type column for Main.
- In June the patron gets the adult patron type. This is a field that can drift or change to reflect the new code.
- After that change, running a report on March or that includes March would show a 10 decrease in Juvenile patron type count and a 10 increase in Adult.
- The overall total for March would be the same and would still be credited to the original Main transaction location.
- The relationship of who they were changes to reflect current status.
- And if the patron moves to a new library service area the March transactions still stay with the original library as recorded by transaction location or Home Library even if that element changed in the patron's record.



# What drifts?

<b>Fields that 'drift'</b>	<b>Fields that remain constant</b>
Zip (Postal) code	Date/time (day, hour, etc.)
Patron type (PTYPE)	Patron home library
Patron codes 1-3 (PCODE)	Item type (ITYPE)
Material type (bibliographic)	Item codes 1-2 (ICODE)
Language (bibliographic)	Transaction location
Format/material type (order)	Transaction type
Order type (ORDTYPE)	Account unit and Fund
Order codes 1-4 (CODE)	Location (order)
	Vendor

Drifting means the field shows the code as it exists in the record today which might be different than what was in place when the transaction happened.

# Comparison - Buena Vista 9/8

- Circulation Activity Report
  - ▣ Checkouts 282
  - ▣ Checkins 423
  - ▣ Renewals 19
  - ▣ Holds 18 (placed by staff in Sierra)
  - ▣ Total 742
- Decision Center
  - ▣ Checkouts 282
  - ▣ Checkins 423
  - ▣ Renewals 19
  - ▣ Holds 18
  - ▣ Total 762 (includes 20 holds filled – not tracked by CAR)

Identical

# Comparison Buena Vista YTD

## □ Circ Activity Report

- Checkouts 48,346
- Checkins 48,419
- Renewals 2,403
- Holds 1,715

## □ Decision Center

- Checkouts 48,346
- Checkins 48,419
- Renewals 2,403
- Holds 1,715

Identical

# MCPLD Selfcheck Central 9/8

- Circulation Activity Report
  - Checkouts 2,861
  - Checkins 2,823
  - Renewals 98
  
- Decision Center
  - Checkouts 2,861
  - Checkins 2,746 (off by 77)
  - Renewals 98

# MCPLD Central Selfcheck YTD

- Circulation Activity Report
  - Checkouts 443,115
  - Checkins 309,715
  - Renewals 12,042
- Decision Center
  - Checkouts 442,635 (480)
  - Checkins 303,644 (6071)
  - Renewals 12,040 (2)
- Stat Group 294

# So can we use DC for Circ stats?

- Decision Center is designed for high level trend reporting. Web Management Statistics for circulation statistical reporting.
- Can be almost the same, especially for short time periods
  - ▣ Total 12 monthly reports vs. one end of the year report
  - ▣ Trend analysis instead of actual counts
    - Impact of Summer Reading Kickoff week
    - Impact of Final Exam week or days after holiday
- So run more frequent reports and then sum them or assume that over a period of time the numbers average out when you run the report over a long time period.

# Why so many checkouts of MDL?

- DC reports where a transaction took place by using a series of lookups.
  - ▣ To determine the transaction locations, DC first identifies the **Statistics Group** number for each transaction.
  - ▣ The system then finds the location code associated with the **Statistics Group** in the **Statistical Group Maintenance** table.
  - ▣ Decision Center looks up the location code in the **Locations Served** table and uses the associated branch location code.
  - ▣ The descriptive name associated with the branch location code comes from the **Branches** table.
  - ▣ If the system cannot find the location code or the branch name in the **Locations Served** table, Decision Center displays the location code that appeared in the **Statistical Group Maintenance** table.

# Still doesn't help.

- When I look at the DC reports I noticed the bulk of the MDL transactions were renewals and holds.
- Typically this is actually Encore or WebPAC patron transactions. Renewing on line or placing holds.
- At Marmot: <http://opac.marmot.org/>
- These transactions are sent to Sierra via an api which funnels these into a specific Stat Group .



# Ok so...

- DC attempts to find a label that corresponds to this stat group and found the MDL.
- A change was made to reorder the names and now it shows as Virtual which means the transaction was done via the catalog.
- Why then are there checkouts and checkins?
  - ▣ Staff logins tied to a stat group of None.
- Couldn't there be checkouts of MDL items?
  - ▣ Only three MDL items have ever gone out.

# MDL/Virtual

- An example of how complex it can be to determine what is this report telling me.
  - ▣ User Manual [http://csdirect.iii.com/manual\\_dc/Default.htm](http://csdirect.iii.com/manual_dc/Default.htm) or click on Help within Decision Center
  - ▣ Especially Appendix section
- In general
  - ▣ Stat Group or Transaction Location can be interchangeable for Sierra transactions.
  - ▣ Assuming stat group and locations served tables are correctly set up

# Abandon All Hope

- Collection Tools > Evaluation > Holdshelf Activity – “The info doesn't look right. I don't understand this report. Should “placed on holdshelf” minus “picked up from holdshelf” equal “abandoned from holdshelf”? Why do most locations show 0 items “abandoned from holdshelf?”
- Abandon from Holdshelf requires running the Clear the Holdshelf program. That is how DC knows the patron didn't pick up the hold.
- Part of the Reports session tomorrow

# Holdshelf Activity

DATE 2015 • PATRON TYPE All Patron Types • PHYSICAL FORMAT All Physical Formats • COLLECTION All Collections

EXPORT

Transaction Location	Placed on Holdshelf	Picked Up From Holdshelf	Abandoned From Holdshelf	Abandoned Percentage
All Locations	459,705	467,753	10,921	2%
Englewood Public Library C130	23,933	20,154	3,537	15%
MCPLD Fruita Branch C536	20,420	18,505	0	0
RLD Woodland Park Branch C334	17,627	15,739	1,423	8%

# Inn Reach

- “Explain what we are really getting from the Inn-reach reports”.
- The Location filter is not where the checkout took place. It is which library owns the material.
- So the reports are showing you a breakdown of material circulating within Marmot and out to InnReach
  - ▣ Your stuff being checked out either to Marmot or Prospector or Mobius

# Inn Reach Example

DATE 2015 • LOCATION Salida Regional Library C336, Salida Regional Library C336 • TRANSACTION Checkouts • PATRON TYPE All Patron Types

EXPORT

Item Type	All Sources	Local	INN- reach
All Item Types	137,235	130,370	6,865
DVD	56,032	53,173	2,859
Book	52,034	49,605	2,429

You might be able to conclude that the majority of the “Local” took place at your library. The exceptions would be items that filled Marmot holds at other locations.

# Turnover Reports

- “Understanding the information from the development tab. Turnover rate by owning location and itype (evaluation) does not appear to work in DC”
- Assume we mean the Turnover reports within the Collections group
- Takes a long time to compile. Cup of coffee to go out to lunch time to compile

# Turnover by Branch

- Bibliographic material type and not item type.
- No option to select location as this is a system report.
  - Location is a roll up to the building level and not individual shelving locations
- The turnover ratio is the quotient of circulated items (circ count) divided by the number of corresponding circable items in the system during the relevant time period.
- More of a trend report. In general what broad categories tend to turn over or circ more.



# Quotient explained

- Items = the number of “circable items” with this location code. (Excluded: items with status m, \$, n, z, o, and l) Things that could circ.
- Circulation = total number of checkouts and renewals for each time period
- Turnover = Circulation divided by Items
- For example:
  - ▣ **BIXBY** 3 items, 15 circ → turnover equals 5
  - ▣ **ARCH** 2 items, 3 circ → turnover equals 1.5

# Example Turnover Report

MATERIAL TYPE AUDIO BOOK

Item Location Filter	Sep 2015	Aug 2015	Jul 2015	Jun 2015	May 2015	Apr 2015	Mar 2015	Feb 2015	Jan 2015	FY 2014	FY 2013	FY 2012
Colorado Christian University C902	0.004	0.012	0.004	0.012	0.004	0.004	0.008	0	0.012	0.195	0.147	0.103
CMC Quigley Library C588	0.033	0.13	0.114	0.078	0.046	0.088	0.097	0.078	0.065	0.961	1.237	0.748
CMC Leadville Campus C896	0.009	0.041	0.069	0.074	0.06	0.106	0.065	0.111	0.074	1.176	1.26	0.615

Looking at Audio Book Bib Mat Type

Could conclude that circulation of these types of material is trending downward and thus either purchase fewer or purchase more popular titles.

# Turnover by Owning Location and Item Type

Collection Tools > Evaluation > Turnover by Branch

1 Initial Filters 2 Output and additional filtering

DATE FY 2015

Display

Turnover

EXPORT

Item Location Filter	AV equipment	Big book	Blank	Blu-ray	Bluray TV Series	Board book	Book	Book Club Kit	Book New	Book on CD	Book on tape
Englewood Public Library C130	0	0	5.714	13.464	0	0	0	0	0	2.7	1
Englewood Schools C130	0	0	0.25	0	0	0	0	0	0	0	0
Error	0	0	0	0	0	0	0	0	0	0	0

Display has a toggle between turnover, circable items and actual circs

With Item Type in the display could see more specific breakdowns then offered with Bib Material Type.

Again could support the decision to reduce spending on certain types of formats.

# Postal Code

- When will the Postal Code by Patron activity report be fixed? Running the report and limiting by branch breaks the report.
- I had hit or miss results.
  - ▣ One did generate an internal server error while other reports ran correctly.
  - ▣ Some reports had a high number of unknowns which means either no “postal code” in the record or Sierra couldn’t parse it out.
- Marmot call in Software Engineering

# Postal Code with Branch Filter

DATE 2015 • LOCATION All Locations • TRANSACTION LOCATION EVLD Avon Public Library C728 • TRANSACTION Checkouts

Postal Code	All Item Types	Adult DVD fiction	Easy book	Non-fiction	Juvenile DVD fiction	Fiction	DVD New	Book New	Juvenile non-fiction	Juvenile fiction	Reader	Adult CD Fiction	Adult DVD non-fiction
All Postal Codes	86,986	13,175	12,101	7,894	7,196	6,841	4,977	4,770	3,789	3,628	3,046	2,075	2,067
81620	35,763	5,720	6,287	2,882	3,184	2,774	2,032	1,605	1,229	1,173	1,191	567	719
81632	23,928	3,109	3,115	1,913	2,292	1,855	1,343	1,401	1,412	986	1,014	555	421
81658	7,344	876	1,021	712	649	565	390	525	318	526	231	209	219

Did work several times.

# Float Management Reports

- My son uses paging to gather up all of the items in Marmot about the Civil War.
- Our local library floats non fiction to reduce amount of material that is in transit within the multi branch system.
- Material from the designated libraries floats to our local library while the other items go back to the owning library.
- My local library now has too many Civil War books.

# Pooling Remedy Report

- Will take a while to compile
- Designate the library to check on for pooling and the libraries that could receive overflow along with the library who originally owned the item.
  - ▣ Make sure you select your libraries otherwise it will assume every library wants your material.

# Pooling example

POOLING LOCATION MCPLD Central Library C508 • RECEIVING LOCATION MCPLD Clifton Branch C566, MCPLD Collbran Branch C560, and 5 more • COLLECTION All Collections • CALL NUMBER RANGE All Call Number Ranges

Hide Float

Hide Multi-Copy

Number  
1000

Shelf Space (in inches)  
24

Showing 1 to 500 of 1186 entries EXPORT

<input checked="" type="checkbox"/>	Item Location	Call Number	Title	Author	Copies in Branch	Last Checkin Date	Created Date	Flag
<input checked="" type="checkbox"/>	C566							
<input checked="" type="checkbox"/>	MCPLD Collbran Juvenile AV C560		<a href="#">Yu-Gi-Oh! Dawn of the duel. Part 1 [videorecording].</a>		1	9/1/15	4/8/09	Float
<input checked="" type="checkbox"/>	MCPLD Collbran Juvenile AV C560		<a href="#">Sid the science kid. The movie [videorecording]</a>		3	8/25/15	6/6/13	Float
<input checked="" type="checkbox"/>	MCPLD Collbran Branch C560	530 K13	<a href="#">Physics of the impossible : a scientific exploration into the world of phasers, force fields, teleportation, and time travel</a>	<a href="#">Kaku, Michio.</a>	2	7/28/15	5/27/08	Multi-Copy
<input checked="" type="checkbox"/>	MCPLD	Biography	<a href="#">Cleopatra : a life</a>	<a href="#">Schiff, Stacy.</a>	2	12/27/14	1/20/11	Multi-Copy

Page 1 of 3 >

Sid the science kid should be send back to Collbran because they owned it.  
Physics of the impossible should sent Collbran because Central has too many.  
If the pooling branch has more copies than it needs to meet 150% of demand, Decision Center makes distribution recommendations for the surplus based on the relative demand at branches that need copies. Branches are determined to need copies if demand exceeds supply. If a branch has no copies, it is determined to need one copy, regardless of demand.



# Drought

- Appears to look at this from the other perspective.  
Libraries that need copies.
- Note with either report you need to select where copies could go to, otherwise it will show libraries out of your system.

# Drought example

DROUGHT LOCATION MCPLD Central Library C508 • SENDING LOCATION MCPLD Clifton Branch C566, MCPLD Collbran Branch C560, and 5 more • COLLECTION All Collections • CALL NUMBER RANGE All Call Number Ranges

Showing 1 to 500 of 655 entries EXPORT

#	<input checked="" type="checkbox"/>	Item Location	Call Number	Title	Author	Copies in Branch	Last Checkin Date	Created Date	Flag
1	<input checked="" type="checkbox"/>	MCPLD Clifton AV C566		<a href="#">Lucy [videorecording] : queen of comedy.</a>		0	8/22/15	6/26/08	Float
2	<input checked="" type="checkbox"/>	MCPLD Clifton AV C566		<a href="#">The first olympics [videorecording] : blood, honor, and glory.</a>		0	8/28/15	10/4/04	Float
3	<input checked="" type="checkbox"/>	MCPLD Clifton AV C566		<a href="#">Ripper Street - Season 3 [videorecording (DVD)].</a>		2	9/5/15	6/29/15	Float
4	<input checked="" type="checkbox"/>	MCPLD Clifton AV C566		<a href="#">Country remedy [videorecording]</a>		1	8/25/15	10/5/09	Float
5	<input checked="" type="checkbox"/>	MCPLD		<a href="#">Agatha christie's miss marple volume 02 [videorecording].</a>		1	9/1/15	4/24/15	Float

Page 1 of 2 >

In this report Central is the library with the drought and the six branches could supply copies. Ripper Street is odd in that it apparently was at Central but floated to Clifton. However Copies In Branch indicates Central has two copies already. You can verify this by clicking on the Title which is a link to a supply and demand graph along with a link to the Ill Classic WebPAC..

# Acquisition Reports

- Would probably prompt a review of certain codes if more libraries started using Acq
  - ▣ Order codes 1-4
  - ▣ Order format
    - VHS/Cassettes and no Blu Ray
- Gulp! Call Numbers
- Two general types of reports
  - ▣ Expenditures – what did over a time period
  - ▣ Trends – what did over time (fiscal years)
  - ▣ If I had a million dollar reports.

# Acquisitions Reports

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- Requires invoicing
  - ▣ Bulk expenditures directly against a fund will not be included
- Expenditure by Call Number Range and Funds will not work as it relies on Bib Call Numbers

# Expenditure Reports

DATE FY 2013 • FORMAT All Formats • VENDOR All Vendors • ORDER TYPE All Order Types

Display												EXPORT
Amount												
Fund	All Order Locations	Adult Catalog	BIXBY	BROKEN ARROW	BROOKSIDE	CENTRAL	CHARLES PAGE	COLLINSVILLE	GENEALOGY	GLENPOOL	H&K KAISER	
All Funds	\$1,177,758.34	\$39,414.37	\$6,888.88	\$29,366.72	\$21,956.88	\$537,830.02	\$10,351.48	\$7,866.08	\$5,573.22	\$7,914.90	\$21,712.56	
adult fiction elec	\$34,714.14	\$34,714.14	0	0	0	0	0	0	0	0	0	
ba standing orders	\$506.03	0	0	\$506.03	0	0	0	0	0	0	0	

DATE FY 2013 • FORMAT All Formats • ORDER LOCATION All Order Locations • CALL NUMBER RANGE TABLE All Call Number Ranges • VENDOR All Vendors

Display												EXPORT
Amount												
Call Number Range	literacy books	mc audio fiction	mc continuations	mc dvds	mc music cds	mr reference	mr spanish bks	mr standing order	mx standing orders	na standing orders	os book-mobile conti	
All Call Number Ranges	\$299.45	\$21,448.74	\$20.14	\$54,183.26	\$19,205.42	\$470.09	\$1,117.65	\$583.50	\$72.82	\$231.72	\$409.82	
Unknown	\$299.45	\$21,015.91	0	\$18,070.47	\$2,476.71	0	\$500.89	\$583.50	\$72.82	\$231.72	\$409.82	
796-796.999 Athletic & outdoor sports & games	0	\$89.97	0	\$611.17	\$56.22	0	\$14.99	0	0	0	0	
641-641.999 Food & drink	0	0	0	\$102.70	0	0	0	0	0	0	0	

# Expenditure Trends

FORMAT All Formats • ORDER LOCATION All Order Locations • ORDER TYPE All Order Types

**Display**

Amount ▾

Show Percent Change

**EXPORT**

Fund	Total for time period	Q4 FY 12/ 13	Q3 FY 12/ 13	Q2 FY 12/ 13	Q1 FY 12/ 13	FY 11/ 12	FY 10/ 11	FY 09/ 10	FY 08/ 09	FY 07/ 08	FY 06/ 07
All Funds	\$19,271,017.78	0	0	\$163,116.48	\$1,014,641.86	\$3,516,331.59	\$3,428,904.87	\$3,544,230.02	\$3,858,002.39	\$3,436,692.71	\$309,097.86
a&t books	\$280.37 0%	0 0	0 0	0 0	0 0	\$80.50 -7%	\$86.98 0%	0 0	0 -100%	\$112.89 0%	0 0
a&t continuations	\$5,704.30 0%	0 0	0 0	0 0	0 0	0 0	0 -100%	\$3,009.99 49%	\$2,020.90 200%	\$673.41 0%	0 0
adult audio nonfict	\$38,737.10 0%	0 0	0 0	0 0	0 0	0 -100%	\$2,196.34 -73%	\$8,227.36 -23%	\$10,667.61 -37%	\$16,922.01 2,238%	\$723.78 0%

FORMAT All Formats • ORDER LOCATION All Order Locations • CALL NUMBER RANGE TABLE All Call Number Ranges

**Display**

Amount ▾

Show Percent Change

**EXPORT**

Call Number Range	Total for time period	Q4 FY 12/ 13	Q3 FY 12/ 13	Q2 FY 12/ 13	Q1 FY 12/ 13	FY 11/ 12	FY 10/ 11	FY 09/ 10	FY 08/ 09	FY 07/ 08	FY 06/ 07
Unknown	\$8,971,177.98 0%	0 0	0 -100%	\$94,704.54 -85%	\$647,438.47 141%	\$1,670,318.93 10%	\$1,518,037.48 -2%	\$1,549,133.96 -9%	\$1,703,186.50 14%	\$1,492,732.73 405%	\$295,625.37 0%
Fiction	\$2,203,520.52 0%	0 0	0 -100%	\$13,970.29 -83%	\$84,501.71 -30%	\$430,452.63 4%	\$412,240.34 -1%	\$416,020.34 -8%	\$451,520.84 14%	\$394,771.96 930,747%	\$42.41 0%
DVD	\$769,430.24 0%	0 0	0 -100%	\$5,621.64 -72%	\$19,991.96 -19%	\$133,117.46 3%	\$128,859.13 -19%	\$159,468.97 -19%	\$195,890.31 55%	\$126,480.76 0%	0 0
Mystery	\$580,468.50 0%	0 0	0 -100%	\$4,901.34 -76%	\$20,833.34 -38%	\$115,615.10 7%	\$107,632.33 6%	\$101,143.62 -13%	\$116,724.49 3%	\$113,618.27 0%	0 0

# Budget Project Reports

Collection Tools > Development > Budget Projection by Fund

1 Initial Filters 2 Output and additional filtering

.LOCATION All Locations • PHYSICAL FORMAT All Physical Formats • COLLECTION All Collections • BUDGET 100,000 • CALCULATE BASED ON FY ENDING 2013

RECALCULATE

Showing 1 to 93 of 93 entries

Fund	Selected Year's Expenditures	% of Total Expenditures	Suggested Budget	Override
adult fiction elec	\$34,714.14	2.9475%	\$2,947.48	<input type="checkbox"/>
ba standing orders	\$506.03	0.043%	\$42.97	<input type="checkbox"/>
br continuations	\$228.80	0.0194%	\$19.43	<input type="checkbox"/>
br standing orders	\$150.11	0.0127%	\$12.75	<input type="checkbox"/>
bx standing orders	\$43.53	0.0037%	\$3.70	<input type="checkbox"/>
cc standing orders	\$961.72	0.0817%	\$81.66	<input type="checkbox"/>

EXPORT

Enter in starting budget in filters.

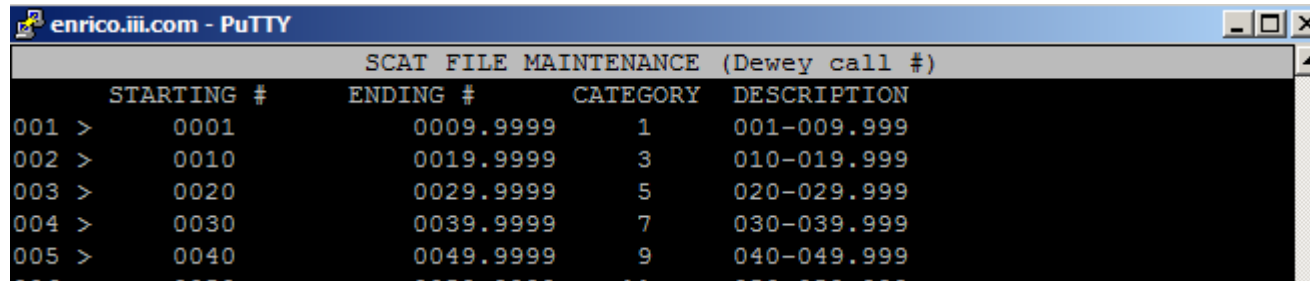
# SCAT (Statistical Categories)

- Seen as Call Number Table or as Subject
- Attempts to parse the item call number into a defined category.
  - ▣ 3 SCAT tables to account for LC, Dewey and Local (Fiction, AV etc.)
- Reports that include call number filter
  - ▣ All call numbers can inflate individual line totals if the call number could hit multiple tables
  - ▣ Grand total will be correct
- Local table is a work in progress
- Adult Circulating Non Fiction tends to be the most accurate due to the absence of pre stamps.
  - ▣ GV 959.32 | Ref GV 959.32 | J GV 959.32

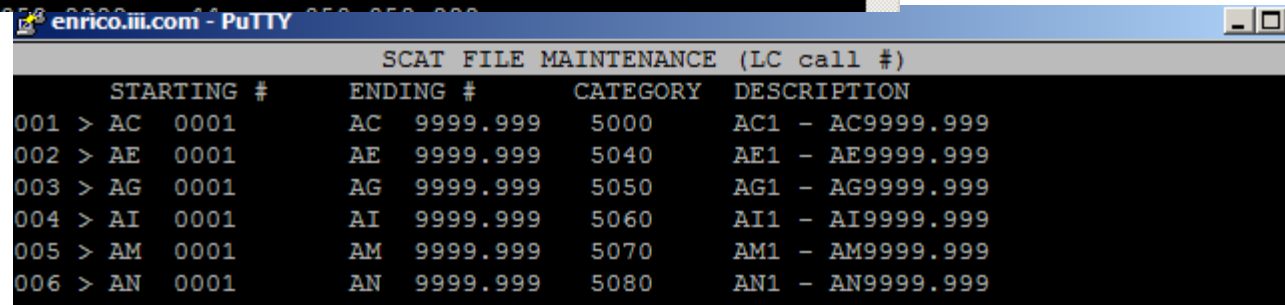


# Call Numbers

- With item call numbers, certain reports will not work since they are based on a bib call number.
- Unknown is call number not found + call number not in SCAT table



```
enrico.iii.com - PuTTY
SCAT FILE MAINTENANCE (Dewey call #)
STARTING #   ENDING #   CATEGORY  DESCRIPTION
001 > 0001     0009.9999  1         001-009.999
002 > 0010     0019.9999  3         010-019.999
003 > 0020     0029.9999  5         020-029.999
004 > 0030     0039.9999  7         030-039.999
005 > 0040     0049.9999  9         040-049.999
```



```
enrico.iii.com - PuTTY
SCAT FILE MAINTENANCE (LC call #)
STARTING #   ENDING #   CATEGORY  DESCRIPTION
001 > AC 0001     AC 9999.999  5000     AC1 - AC9999.999
002 > AE 0001     AE 9999.999  5040     AE1 - AE9999.999
003 > AG 0001     AG 9999.999  5050     AG1 - AG9999.999
004 > AI 0001     AI 9999.999  5060     AI1 - AI9999.999
005 > AM 0001     AM 9999.999  5070     AM1 - AM9999.999
006 > AN 0001     AN 9999.999  5080     AN1 - AN9999.999
```

# Collection Maintenance

- Development – Selection Reports
  - ▣ Popular Authors – how many of next title to buy
  - ▣ Supply and Demand Buying – to reduce wait time
  - ▣ Hold to Item Ratio Buying – to hit a desired ratio
- With preference to local holds set, verifying enough local items to meet local demand could be useful/important
- Hold to Item Ratio can be run on order copies

# Popular Authors

LOCATION Buena Vista Public Library C844 • PHYSICAL FORMAT Book / Serial • COLLECTION All Collections

Showing 1 to 500 of 1000 entries

Number

EXPORT

#	Author	Monthly Circulations	Number of Titles	Number of Items
5	<a href="#">Hunter, Erin</a>	16	44	44
6	<a href="#">Box, C. J.</a>	16	25	25
7	<a href="#">Osborne, Mary Pope</a>	15	36	36
8	<a href="#">O'Connor, Jane</a>	15	25	25
9	<a href="#">Sandford, John, 1944 February 23-</a>	14	50	51
10	<a href="#">Miller, Linda Lael</a>	14	28	28
11	<a href="#">Coel, Margaret, 1937-</a>	13	17	18
12	<a href="#">Burke, James Lee, 1936-</a>	13	32	32
13	<a href="#">Dailey, Janet</a>	12	21	21
14	<a href="#">Child, Lee</a>	12	17	18
15	<a href="#">Seuss, Dr.</a>	12	38	41
16	<a href="#">Bass, G. L. author</a>	12	4	5

Page 1 of 2

Part of this report works. The summary of most popular authors based on average monthly circulation over the last 90 days.

Clicking on an author would show the titles and selecting a title would show a calculated number to purchase based on the one you selected.

# Supply and Demand

LOCATION Buena Vista Public Library C844 • PHYSICAL FORMAT Book / Serial • COLLECTION All Collections • WAIT TIME GREATER THAN (DAYS) 60

First Item Created Before

09/09/2015

Demand Greater Than

20

Purchase Amount

500

Showing 1 to 25 of 25 entries EXPORT

Author	Call Number	First Item Created	Hold Queue	Current Hold Wait Time	Item Count	On Order Copies	Monthly Supply	Monthly Demand	Price Per Copy	Copies to Buy	Project Hold Wa Time
<a href="#">Hawkins, Paula</a>	FIC Haw	1/29/15	7	184	1	0	1.1	2	0	2	49
<a href="#">Patterson, James, 1947- author.</a>	FIC Pat	3/30/15	6	155	1	0	1.2	4	28	2	56
<a href="#">Lee, Harper, author.</a>	FIC Lee	2/11/15	6	151	1	0	1.2	4	24.99	2	54
<a href="#">Box, C. J., author.</a>	FIC Box	3/30/15	5	128	1	0	1.2	3	26.99	2	38
<a href="#">McLain, Paula</a>	FIC McL	8/13/15	4	103	1	0	1.2	5	17.31	2	47
<a href="#">Gawande, Atul, author.</a>	362.17 Gaw	12/2/14	3	90	1	0	1	4	26	2	40
<a href="#">Hannah, Kristin, author.</a>	FIC Han	3/5/15	2	54	1	0	1.4	5	27.00	2	37

Extended Amount Total

**\$736.93**

## Remedy filters

First Item created before to exclude recently published

Demand Greater than to limit to most popular

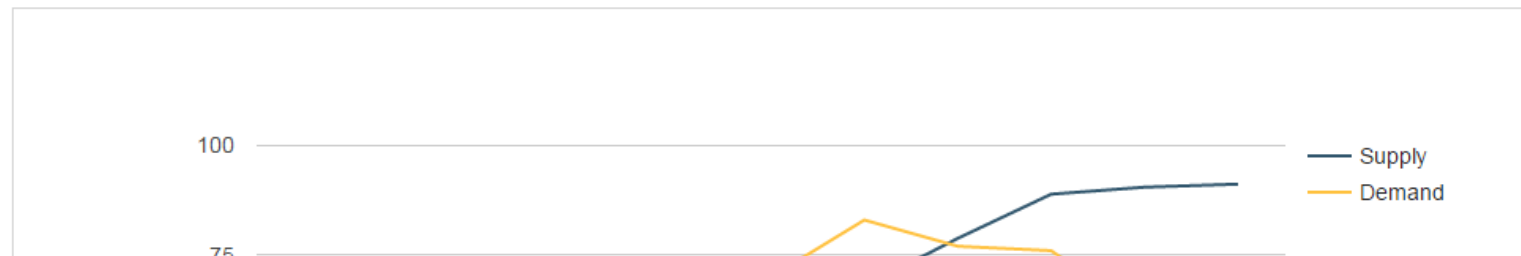
Purchase amount when you have limited funds

Price per copy comes from order expenditure (if found) or item price field

# Supply/Demand Click Thru

	<b>NYPD red 3 / James Patterson and Marshall Karp.</b>	<b>DEMAND 59</b>	<b>SUPPLY 86</b>
	<p><a href="#">Patterson, James, 1947- author.</a> Material Type: BOOK/SERIAL Language: English Record Number: <a href="#">4311333</a> ISBN: 9780316406994 Price Per Copy: \$25.54</p>	<p>5 holds placed 54 non-hold circulations</p>	<p>47 copies 1.84 circs / copy / month</p>
		hold queue	1
		current hold wait time	1

## SUPPLY/DEMAND OVER TIME



Supply looks at the number of copies in the system and the average monthly circ.

# Hold to Item Ratio

LOCATION BROKEN ARROW • MATERIAL TYPE All Material Types • HOLD-TO-ITEM RATIO GREATER THAN 3

Purchase Amount

500

Showing 1 to 39 of 39 entries EXPORT

Title	Author	First Order Date	Hold Queue	On Order Copies	Hold to Item Ratio	Estimated Price per Copy	Copies to Buy	Extended Amount
<a href="#">Mama [videorecording]</a>		5/22/13	14	1	14.0	22.49	4	\$89.96
<a href="#">Alex Cross [videorecording]</a>		5/15/13	13	1	13.0	22.49	4	\$89.96
<a href="#">Atlas shrugged, Part II [videorecording]</a>		5/15/13	10	1	10.0	11.24	3	\$33.72
<a href="#">Hotel Transylvania [videorecording]</a>		5/19/13	10	1	10.0	23.24	3	\$69.72
<a href="#">Battleship [videorecording]</a>		5/15/13	10	1	10.0	14.99	3	\$44.97
<a href="#">Best of Warner Bros. 50 cartoon collection. Looney tunes [videorecording]</a>		6/23/13	12	1	12.0	20.24	3	\$60.72
<a href="#">Salmon fishing in the Yemen [videorecording]</a>		5/23/13	8	1	8.0	14.99	2	\$29.98

Extended Amount Total  
**\$1,113.22**

Run on order records

# Collection Tools

COLLECTION 002 Adult book

Showing 1 to 12 of 12 entries

**EXPORT**

#	Branch	Number of Titles	Number of Items	Checkouts Last 365 Days	Renewals Last 365 Days	Total Circs Last 365 Days	Turnover	Recommendation
1	ASD High School Library	1	1	0	0	0	0	Weed
2	Buena Vista Public Library C844	6,817	6,894	8,263	561	8,824	1.28	Weed
3	CMC Steamboat Campus C726	1	1	16	1	17	17	Expand
4	Englewood Public Library C130	46,425	48,856	48,423	6,451	54,874	1.12	Weed
5	ES High School C130	144	146	205	20	225	1.54	Weed
6	Fort Lewis College C504	1	1	0	0	0	0	Weed
7	MCPLD Central Library C508	7	7	3,882	427	4,309	615.57	Expand

**Weed if Turnover Less Than**  
2

**Expand if Turnover Greater Than**  
8

**Minimum Number of Titles**  
15

Recommendations to expand or weed

Based on Item Types

Consortia could roll up groups of item types such as all books otherwise make sure you filter in all logical item types to review

# Weeding Reports

- Low Circulation Weeding
- High Circulation Weeding – review for condition
- Missing (billed, in transit and on holdshelf)
  
- Keys to these reports is that output can be exported directly into a Create List Review File



# Low Circulation Report

## Low Circulation Weeding

[9/9/15]



Location: Eagle Valley Library District, EVLD Eagle Public Library C730,

Call Number Range: All Call Number Ranges

Physical Format: All Physical Formats

Circs fewer than 1

Collection: All Collections

Within (months): 48

Item Location	Call Number	Title	Author	Total Circs	Copies in Branch	Copies in System	Last Checkin Date	Created Date	Item Status	Barcode	Notes
EVLD Eagle Colorado Books	REF 978.844	The Chambers family which came to Eagle in	Caruthers, Jody Chambers.	0	1	1		6/30/06	ON SHELF	1060003731434	
EVLD Eagle Public Library C730	577.64 HOO	Rivertime : ecotravel on the world's rivers	Hood, Mary A., 1944-	0	1	1		4/22/08	ON SHELF	1060004132543	
EVLD Eagle Vertical File C730	VF EAG	Eagle County--Hidden Gems Wilderness		0	1	1		8/20/09	ON SHELF	1060004557576	
EVLD Eagle Colorado Books	REF 978.8 PLA	Place names of Colorado : a genealogical & historical		0	1	5		6/27/01	ON SHELF	1060002168116	

# High Circulation

## High Circulation Weeding

[9/9/15]



Location: Buena Vista Public Library C844  
 Physical Format: All Physical Formats  
 Collection: All Collections  
 Total checkouts greater than 10

Notes:

Item Location	Call Number	Title	Author	Total Circs	Copies in Branch	Copies in System	Last Checkin Date	Created Date	Barcode	Item Status	Notes
Buena Vista New Adult Fiction C844	FIC Chi	Personal : a Jack Reacher novel	Child, Lee.	26	1	54	9/3/15	12/2/14	31202000586961	ON SHELF	
Buena Vista DVD Fiction C844	DVD FIC Mos	A most wanted man		25	1	28	9/8/15	1/20/15	31202000590120	ON SHELF	
Buena Vista DVD Fiction C844	DVD FIC Cap	Captain America. The Winter Soldier		24	1	41	8/24/15	12/2/14	31202000589924	ON SHELF	
Buena Vista Large Print Fic C844	LP FIC Dev	Change of heart [text (large print)]	Deveraux, Jude.	24	1	5	8/25/15	12/2/14	31202000589890	ON SHELF	
Buena Vista DVD Fiction C844	DVD FIC Che	Chef		24	1	30	8/26/15	12/2/14	31202000588306	ON SHELF	
Buena Vista New Adult Fiction C844	M Kno	Robert B. Parker's The bridge	Knott, Robert, 1954-author.	24	1	34	9/1/15	12/2/14	31202000589452	ON SHELF	
Buena Vista New Adult Fiction C844	FIC Box	Shots fired : stories from Joe Pickett	Box, C. J.	24	1	33	8/28/15	12/2/14	31202000582523	ON SHELF	

# What is next with Decision Center?

- Development Team
- Q4 2015 Service Pack (fixes)
- 2016 Service Pack and 1.1 Release
  
- IUG Enhancements
  - ▣ Save searches/Custom Reports/Email Report
  - ▣ Numerous Marmot Requests

# Questions?

